

Frequently Asked Questions

Why is Apex joining Fiera Capital?

We pride ourselves in the strong long term investment performance and attentive service we have provided for clients since our founding in 1987. Apex will become part of Fiera Capital Inc., the U.S. division of Fiera Capital Corporation. Fiera Capital has a culture of performance and client service aimed at surpassing client expectations that parallels our own. As we look to a bright and promising future, we are confident that joining Fiera Capital is the right choice for our clients and employees.

We believe that our existing clients will benefit from the deeper resources, diverse expertise and enhanced research capabilities offered by Fiera Capital.

Who is Fiera Capital Corporation?

[Fiera Capital Corporation](#) is an independent investment management firm with more than US\$70 billion in assets under management whose stock trades on the Toronto Stock Exchange. It is one of Canada's leading investment managers with offices in all major Canadian financial centers and a growing presence in the U.S. with offices in New-York, Boston, Los Angeles, San Francisco and, with the acquisition of Apex, Dayton.

Fiera Capital is recognized in Canada for its excellence in portfolio management, innovative and personalized investment solutions, and its tireless efforts to surpass client expectations. They have extensive expertise in Canadian active and structured fixed income, Canadian, US and global equity, asset allocation and non-traditional investment solutions through a broad range of strategies and services.

What is the mission of the Fiera Capital U.S. asset management entity?

Fiera Capital Inc.'s mission is to provide clients with the highest quality of customized service and performance through a culture of integrity, teamwork, excellence, and innovation. Fiera Capital Inc. specializes in global equity and bond markets, providing individualized investment management to individuals, families, pension and profit sharing plans, trusts, estates, charitable organizations, corporations, and private investment vehicles. Apex will add a complementary set of growth equity strategies to Fiera Capital Inc.'s suite of investment solutions.

Additional information is available at:

- www.samsonca.com
- www.wilkinsonogrady.com
- www.fierausa.com

Why is this good for existing clients?

We believe that our existing clients will benefit from this combination as it will expand our resources, depth and global research capabilities, assisting us in striving to provide the investment performance and high-quality client service our clients have come to expect.

Why is this good for the owners and employees of Apex?

This collaboration provides the owners and employees of Apex the opportunity to continue to build a premier U.S. investment management firm. The current Apex team will play a critical role in the future development of Fiera Capital Inc.

Nitin Kumbhani will assume the role of Vice Chairman and Chief of Growth Equity Strategies at Fiera Capital Inc. and serve as a member of Fiera Capital Inc.'s board of directors.

We are fully committed to you and to our business. All of the owners of Apex have signed employment contracts with long-term incentives to help ensure that our interests are aligned with those of our clients. As part of the transaction, current Apex owners will become shareholders of Fiera Capital Corporation, further investing us in the ongoing success of the company.

Will my portfolio manager change?

There will be no changes to the portfolio management team.

Will there be changes in my fees?

There are no plans to change investment management fees.

Will your investment process change?

The investment philosophy and process will not change.

Will Apex still continue to exist?

The Apex Capital Management name will remain for now, but will transition at sometime in the future to capitalize on the Fiera Capital brand.

How do the cultures of Apex and Fiera Capital compare?

Fiera Capital is recognized for fostering entrepreneurship and its excellence in portfolio management, innovative and personalized investment solutions, and its tireless efforts to surpass client expectations. This parallels the values on which Apex was founded.